Arizona Department Of Transportation

Partnering Evaluation Program

PEP Construction ADOT User Manual

March 2005

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Overview

The Arizona Department of Transportation, (ADOT), currently administers nearly $1 billion in highway construction contracts. The increasing demand for quality, integrity, and excellence in the construction process is a sentiment that is echoed throughout Arizona, and the world.

Beyond the traditional Partnering approach lies PEP IV ……….

The Partnering Evaluation Program, PEP IV, represents a comprehensive approach to automating the project team partnering evaluations at ADOT. PEP II was designed to meet the demands of current and future construction programs.

The PEP II software application was developed based on the intensive research findings performed by the ADOT Partnering Team. PEP II is an effective and efficient project management tool. This tool will assist project team members to answer three common, but often elusive management questions:

> 1. **W**hat is the issue?
> 2. **W**hy is a solution necessary?
> 3. **W**hat steps must be taken to resolve the issue?

PEP IV identifies, then interprets the data components of a typical construction project, which include, progress measurements, quality, issue resolution, relationship status, and communication opportunities.

The PEP IV program is a bold step forward that will enhance the Partnering efforts in Arizona, and throughout other organizations.

Goals

- ➢ Maximize the effectiveness and efficiency of the ADOT Partnering process.

- ➢ Expedite timely decisions and increase prompt issue resolution.

- ➢ Support the development of an autonomous project team among ADOT, contractors, subcontractors, suppliers, and others.

- ➢ Achieve optimal balance between measurement and efficiency in the Partnering process at the Field, District, and the Senior Leader level.
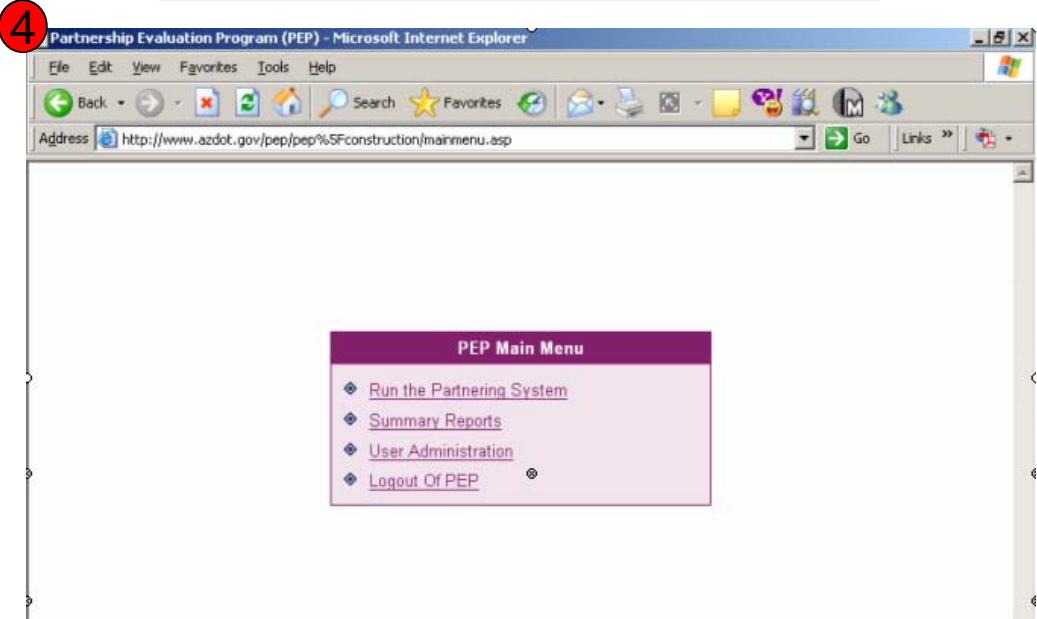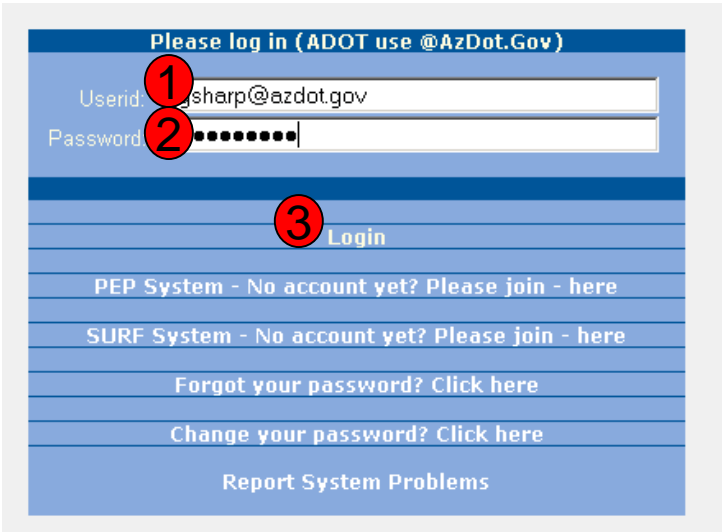
Accessing the PEP Web Application

PEP4 is an Internet Based Application which can be accessed using Microsoft's Internet Explorer Software.

1. Run Microsoft's Internet Explorer.
2. Enter http://www.azdot.gov/pep/pep_construction in the Internet Explorer's address box.
3. The ADOT PEP / Surf Login will be displayed.
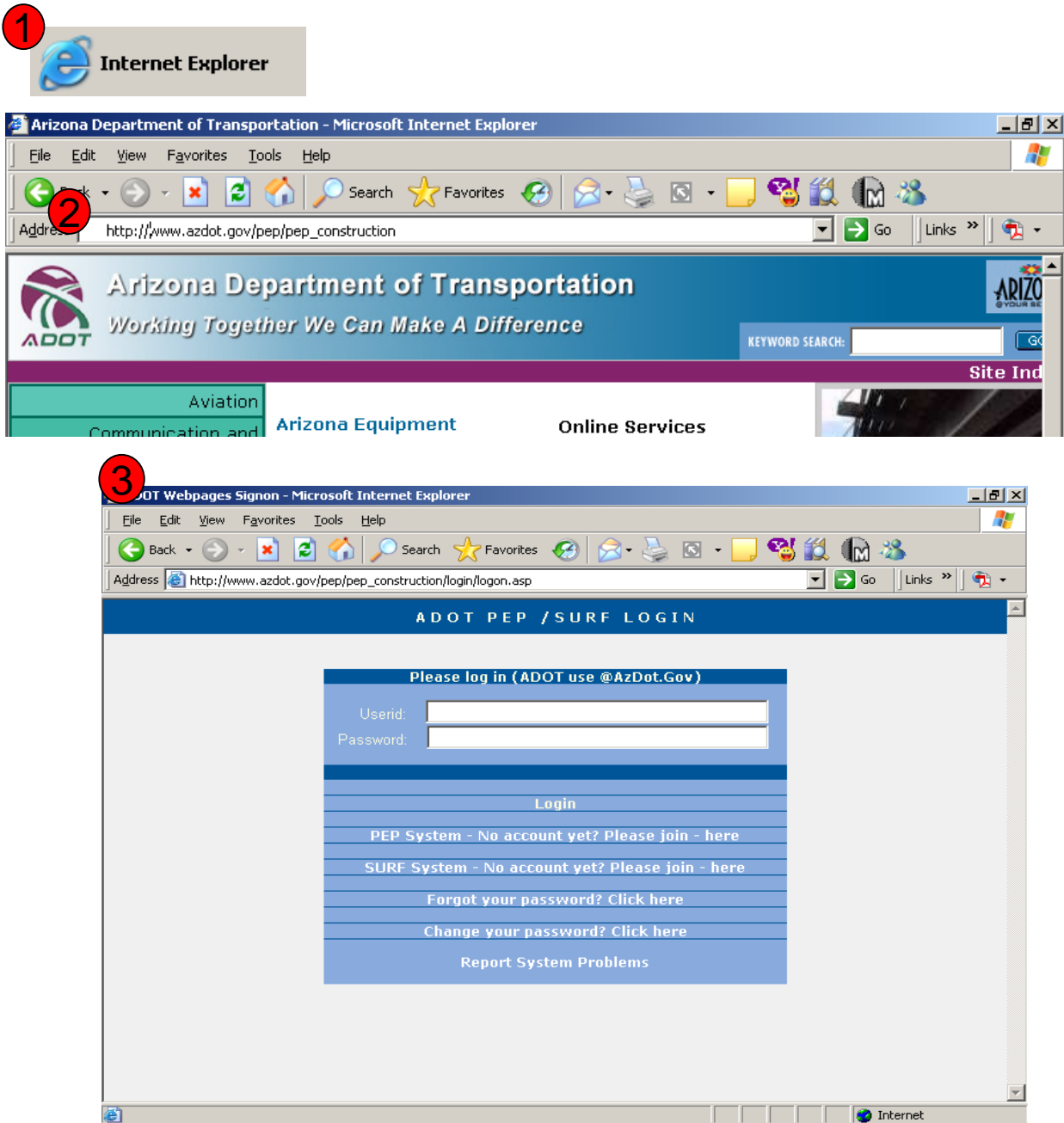
Logging In To PEP – Existing Users

1) Enter your PEP User ID.
2) Enter your PEP Password.
3) Click 'LOGIN'
4) The PEP Main Menu will be displayed.

Logging In To PEP – New Users

Select "No Account Yet"

ADOT Users:

Enter First Name, Last Name, and E-mail address

3

A Confirmation E-mail message will be sent with a system generated password

4

System generated Password

5

Enter Password from Email

6

Select "Run Partnering System"

Managing Ratings

From the PEP Ratings Management Screen a user can Add, Edit and
Delete ratings/comments, as well as produce a detailed report of ratings
and comments.

1) From the PEP Main Menu, select 'Run the Partnering
System'.
2) The PEP Ratings Management Screen will be displayed.
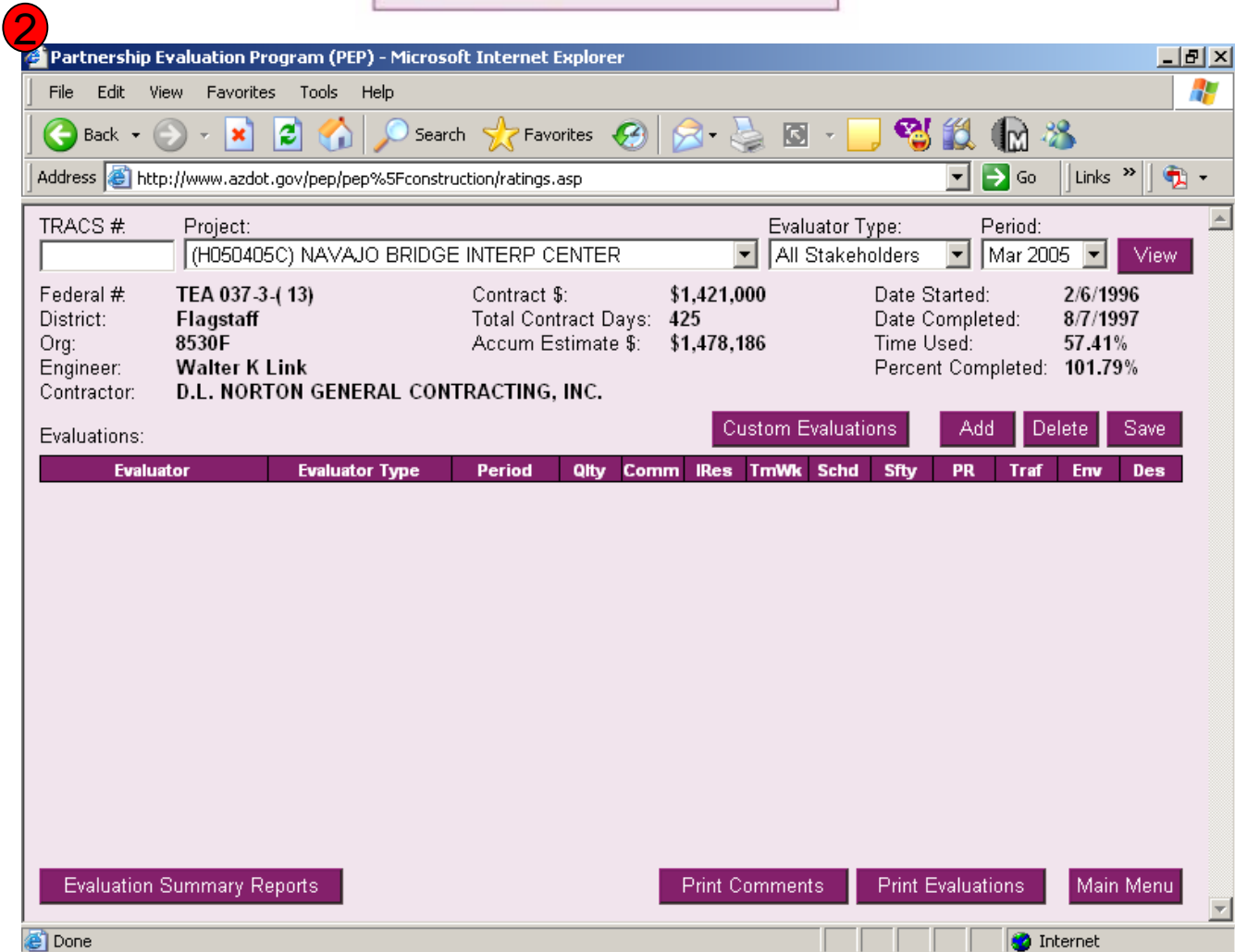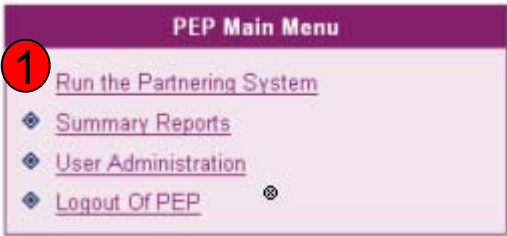
Ratings Screen Described

The PEP Ratings Management Screen allows a user to Add, Edit and Delete ratings.

1) TRACS # - An entry into this box will search the project list for the specified project's TRACS number.
2) Project – Ratings are displayed for the selected project.
3) Evaluator Type – Ratings are displayed for the selected evaluator type.
4) Period – Ratings are displayed for the selected period.
5) View – Ratings are displayed for the selected project, evaluator type and period when clicked.
6) Custom Evaluations – Custom evaluations types 6-10 can be defined with this function as well as the sub goals for all evaluation types.
7) Add – Adds a new rating.
8) Delete – Deletes the currently selected rating.
9) Save – Saves any Added or Edited Ratings.
10) Ratings – Ratings for a project
11) Evaluation Summary Reports – Runs the PEP Summary Reports.
12) Print Comments – Prints Comments for the selected Project, Evaluator type and Period.
13) Print Evaluations – Prints Evaluations for the selected Project, Evaluator type and Period.
14) Main Menu – Returns to the PEP Main Menu
15) Information which describes the Selected Project.

Adding A New Rating

1) Click the 'Add' button.

2) Your new rating will be added to the bottom of the Rating List, with your name, evaluator type, and period already populated. If entering for a user other than yourself, the information can be adjusted accordingly. Enter the new ratings by replacing the default ones.

3) Once all ratings have been added, Select the 'Save' Button.

4) Select 'Yes' from the Save Confirmation Dialog to save your new ratings.

Deleting An Existing Rating

1) Select the rating you wish to delete by clicking on any portion of it.
2) Click the 'Delete' Button.
3) Select 'Yes' from the Save Confirmation Dialog to save your new ratings.

Saving Changes To Existing Ratings

1) Make the changes to the applicable ratings.
2) Click the 'Save' Button.
3) Select 'Yes' from the Save Confirmation Dialog to save your changes to the ratings.

Managing Comments For A Rating

1) Double click on the specific rating the comment will be associated with.
2) The comment entry screen will be displayed.
3) Select the type of comment.
4) Enter the comment.
5) Click the 'OK' button when finished, your comment will not be saved till you click the 'Save' button on the Ratings Management Screen.

Printing Comments

1) Click the 'Print Comments' button on the Ratings Management Screen.
2) Select 'Yes' or 'No' whether or not to include the evaluator's name on the comment report.
3) The comment report will then be displayed.
4) From the File menu, select Print.
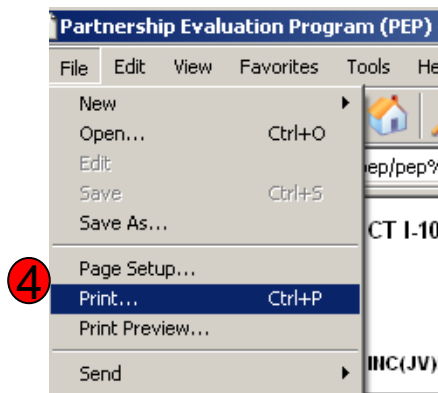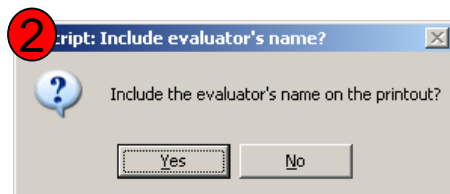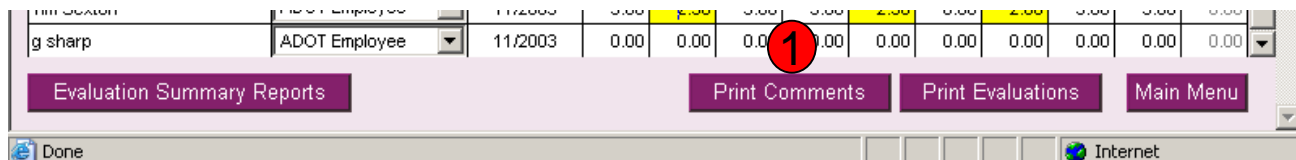
Printing Ratings

1) Click the 'Print Evaluations' button on the Ratings Management Screen.
2) Select 'Yes' or 'No' whether or not to include the evaluator's name on the Ratings report.
3) The ratings report will then be displayed.
4) From the File menu, select Print.
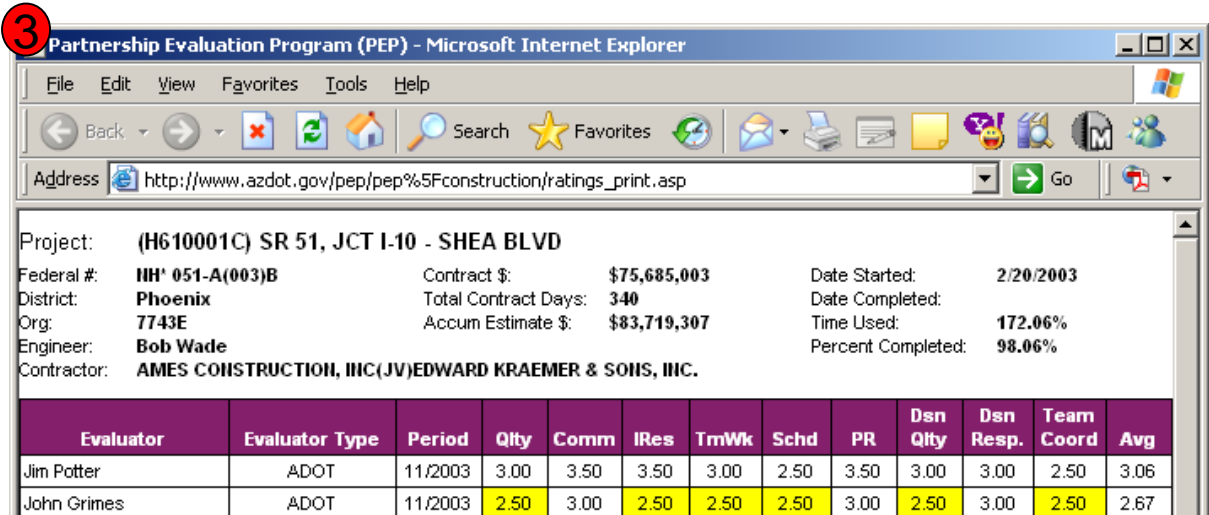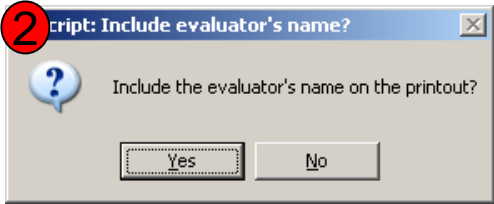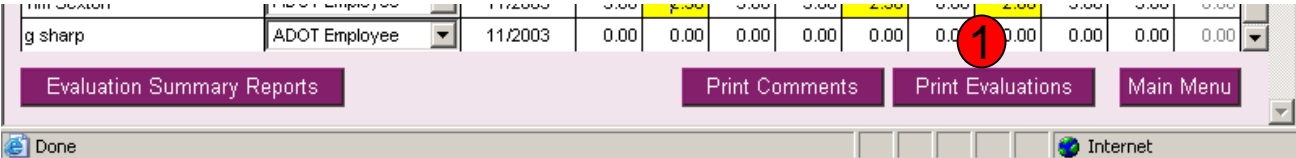
Custom Evaluations

1) Click the 'Custom Evaluations' button on the Ratings Management Screen.
2) The Custom Evaluations screen will then be displayed.
3) Enter the abbreviation of the evaluation type for evaluations 6-10.
4) Enter the name of the evaluation type for evaluations 6-10.
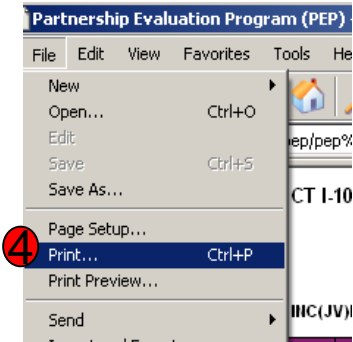5) Enter the Sub-Goal descriptions for evaluations 1-10.
6) Select 'Ok' to Save

Summary Reports

From the PEP Ratings Management Screen a user can access the PEP Summary Reports.

1) From the PEP Main Menu, select 'Summary Reports'.
2) The Summary Reports Screen will be displayed.
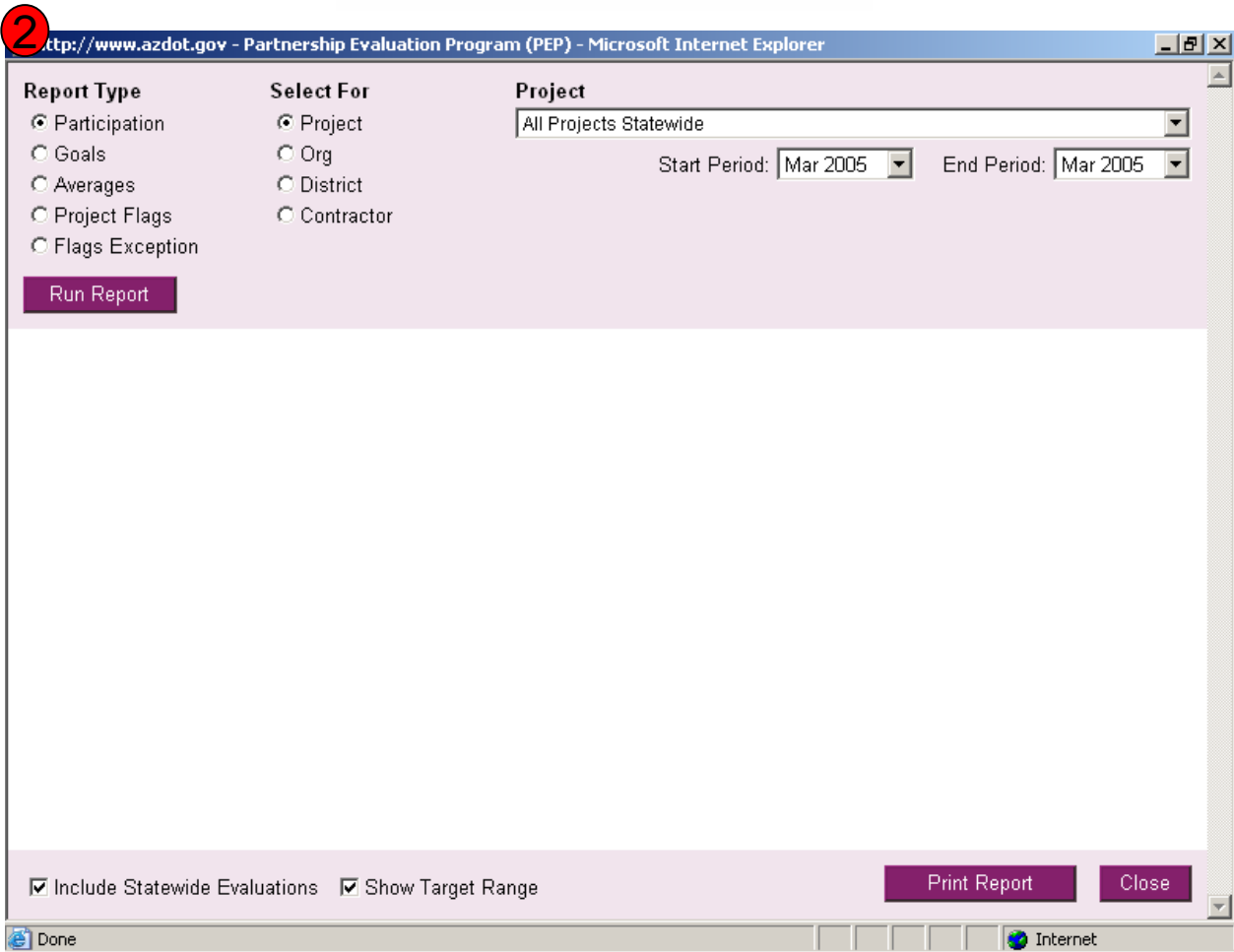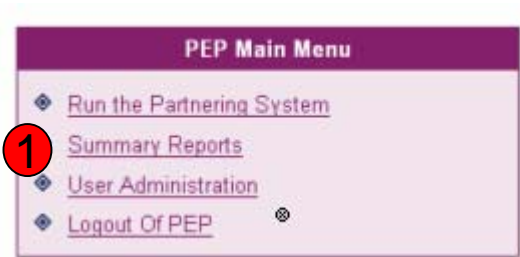
Summary Reports Described
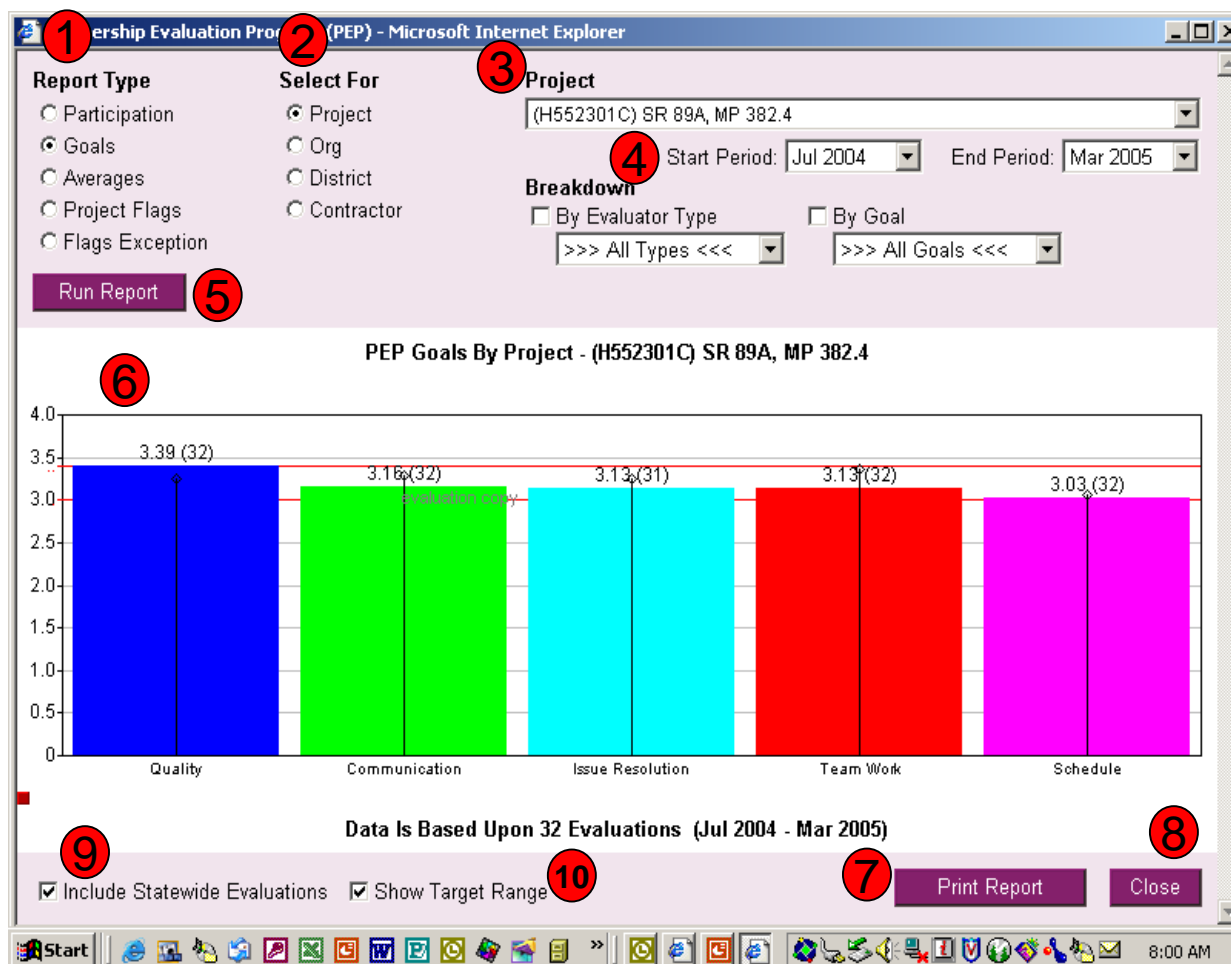
The PEP Summary Reports Screen allows a user to run management style reports for the Partnership ratings managed in the PEP system.

1) Report Type – There are five types of reports that can be selected to run.
2) Select For – The summary report can be filtered to display information specific to a Project, Org, District or Contractor.
3) Select a specific Project, Org or Contractor to filter summary report by.
4) Start Period/End Period – A date range to filter the summary report by.
5) Run Report – Runs the report for the specified Report Type, Select For Filter and Period Date Range.
6) Report Results are displayed in this area.
7) Print Report – Prints the current summary report to a printer.
8) Close – Closes the Summary Report Screen and returns to the PEP Main Menu.
9) Include Statewide Evaluations – Include summary information for partnerships statewide in the summary report.
10) Show Target Range – Include the PEP target range markers in the summary report.

Participation Report

The PEP Participation Summary Report displays information related to the participation level by evaluator type for a specified criteria.

1) Click the 'Participation' option.
2) Click the option for which ratings for the reports will be filtered.
3) Select detailed criteria for which ratings will be included in the report.
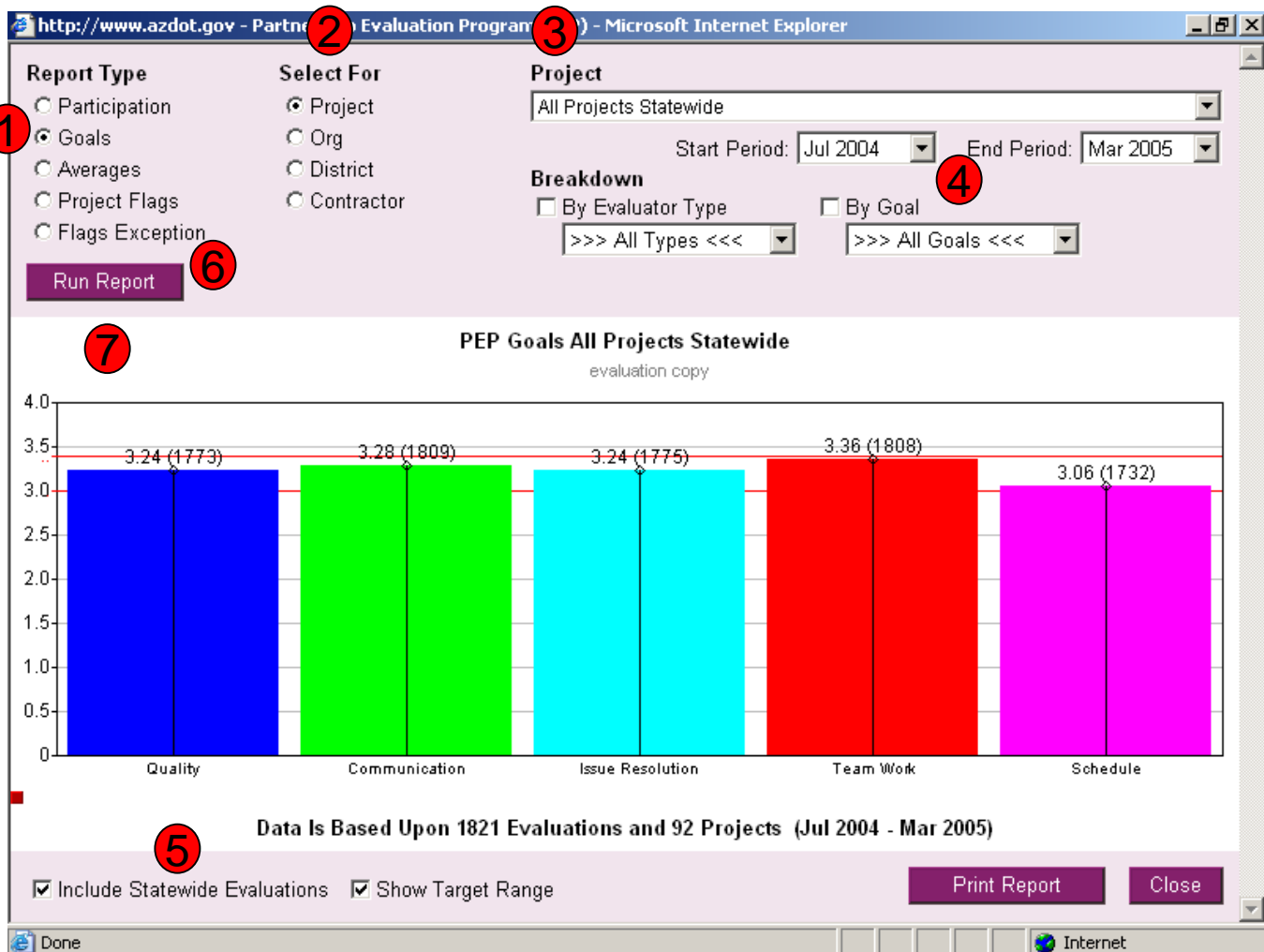4) Select the Period Date Range for which ratings will be included in the report.
5) Click the Run Report Button.
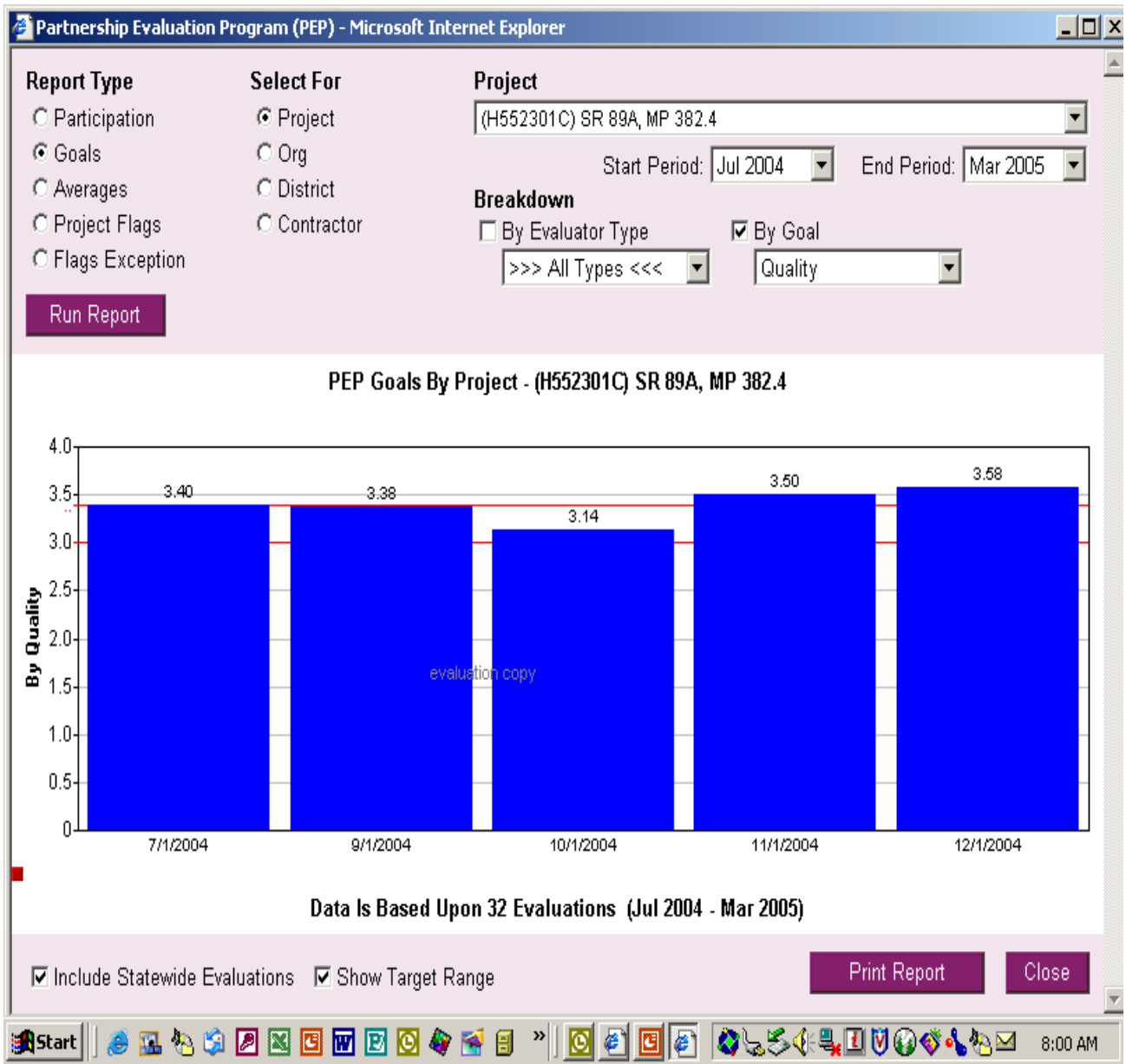6) The Participation summary report will be displayed.
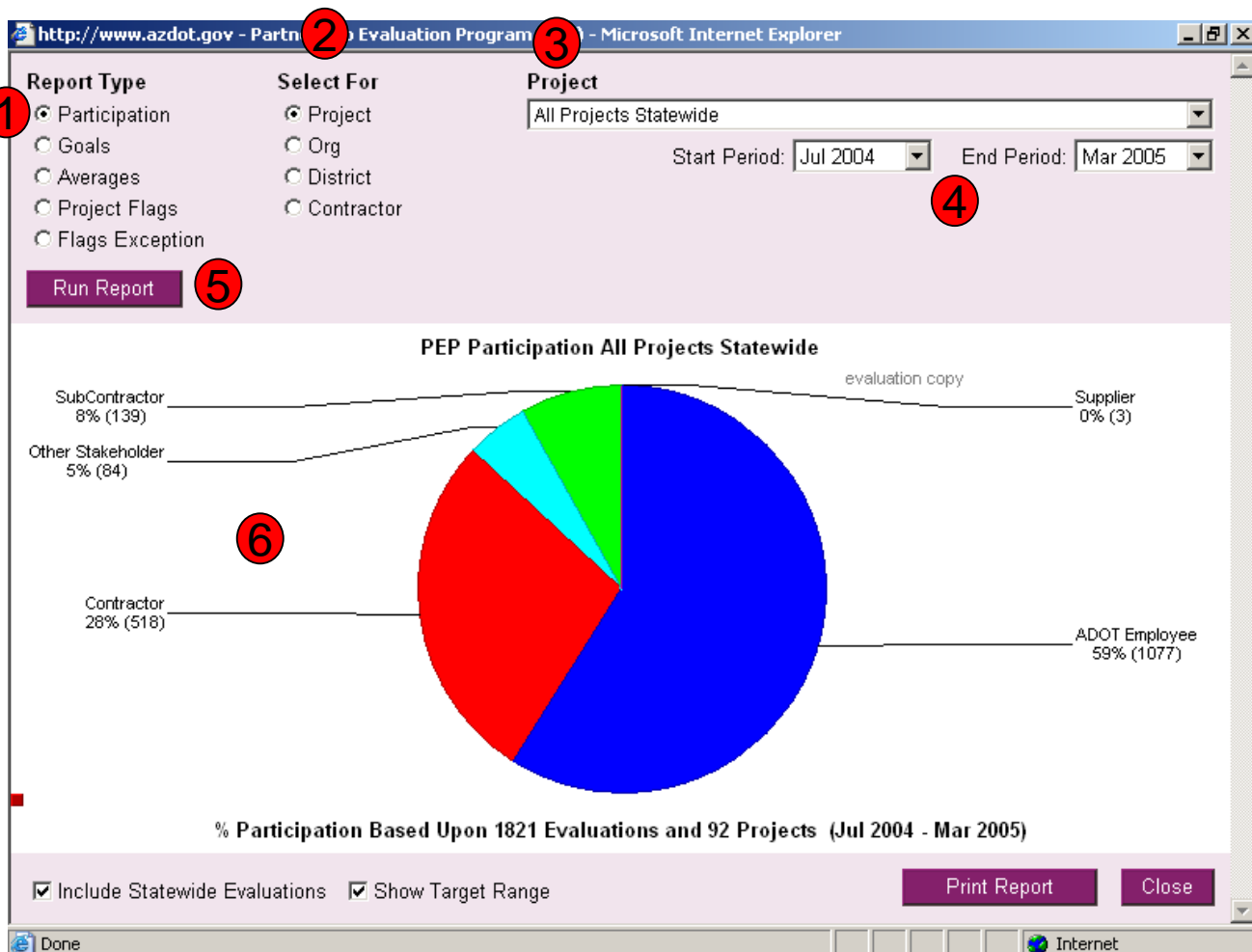
Goals Report

The PEP Goals Summary Report displays information related to how well a selected criteria is achieving its partnering goals.
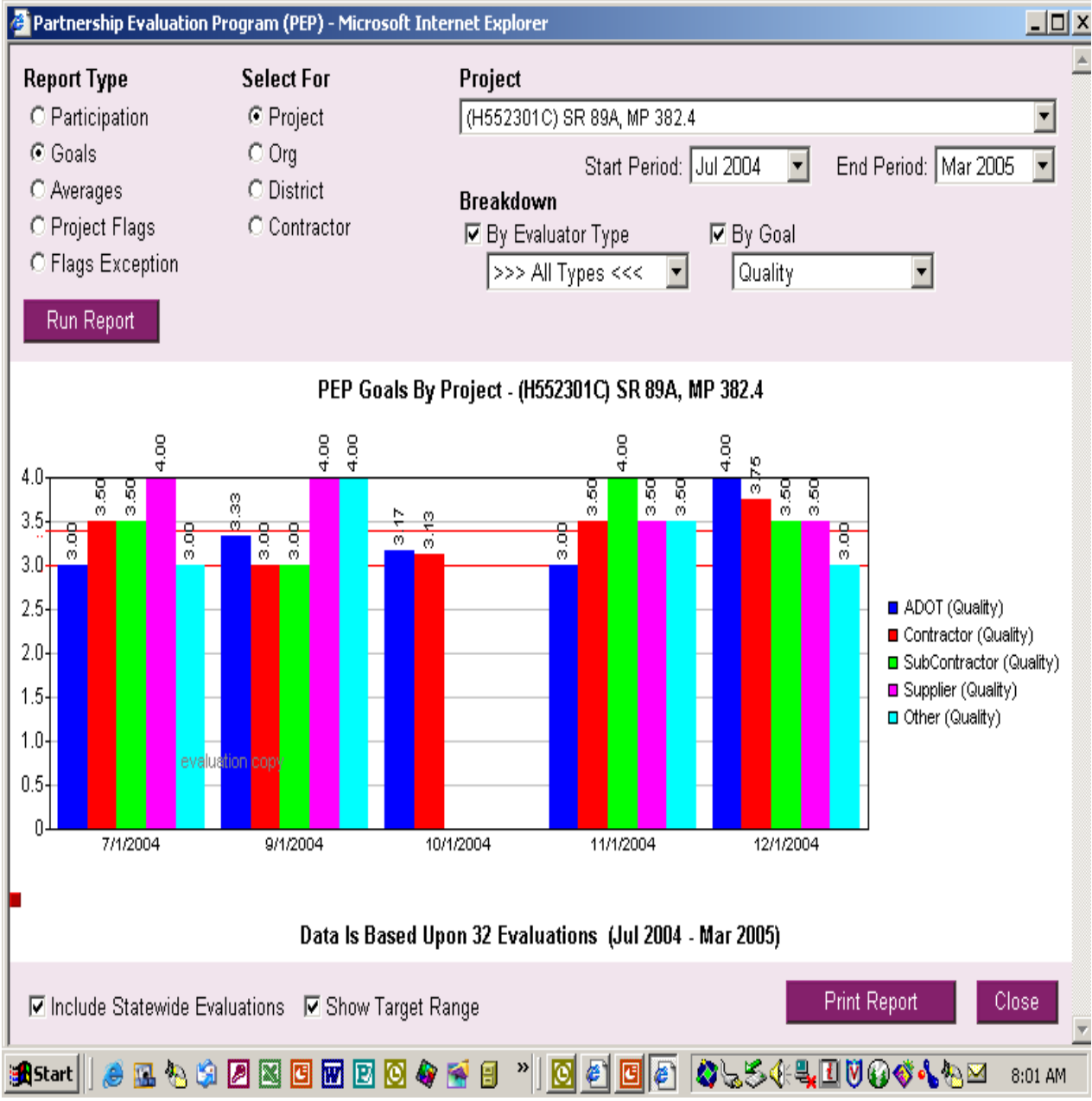
1) Click the 'Goals' option.
2) Click the option for which ratings for the reports will be filtered.
3) Select detailed criteria for which ratings will be included in the report.
4) Select the Period Date Range for which ratings will be included in the report as well as if the report should be broken-down by the Evaluator Type or Goal.
5) Select whether or not to include the statewide averages or target ranges on the summary report
6) Click 'Run Report'
7) The Goals summary report will be displayed.

Goals Report – Trend Analysis by "Quality"

PEP Goals By Project - (H552301C) SR 89A, MP 382.4

Goals Report – Trend Analysis by "Stakeholders"

Averages Report

The PEP Goals Summary Report displays information related to the average ratings by evaluator types for a specified criteria.

1) Click the 'Averages' option.
2) Click the option for which ratings for the reports will be filtered.
3) Select detailed criteria for which ratings will be included in the report.
4) Select the Period Date Range for which ratings will be included in the report.
5) Select whether or not to include the statewide averages or target ranges on the summary report
6) Click 'Run Report'
7) The Averages Summary Report will be displayed.
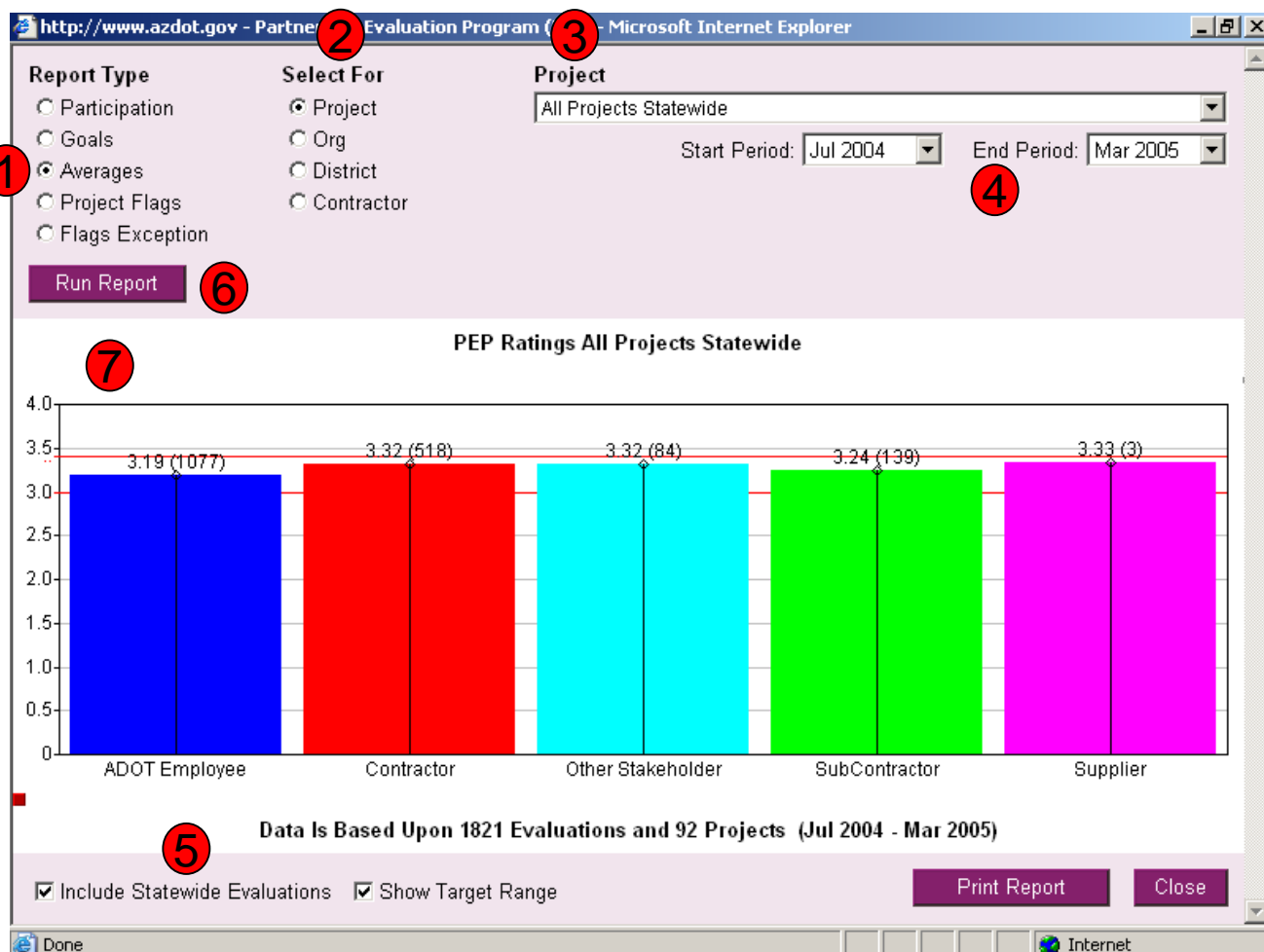
Project Flags Report

The PEP Goals Summary Report displays information related to the average ratings by evaluator types for a specified criteria.

1) Click the 'Project Flags' option.
2) Click the option for which ratings for the reports will be filtered.
3) Select detailed criteria for which ratings will be included in the report.
4) Select the Period Date Range for which ratings will be included in the report.
5) Select the type of ratings which will included in the report.
6) Click 'Run Report'
7) The Project Flags Report will be displayed.

Flags Exceptions Report

The PEP Flags Exception Report displays projects which have evaluation periods, missing ratings.

1) Click the 'Flags Exception' option.
2) Click the option for which ratings for the reports will be filtered.
3) Select detailed criteria for which ratings will be included in the report.
4) Select the Period Date Range for which ratings will be included in the report.
5) Click 'Run Report'
6) The Flags Exception Report will be displayed.
7) Shows Months that PEP Evaluations are missing

Printing Reports

1) Click the 'Print Report' button on the Summary Report Screen.
2) The ratings report will then be displayed.
3) From the File menu, select Print.
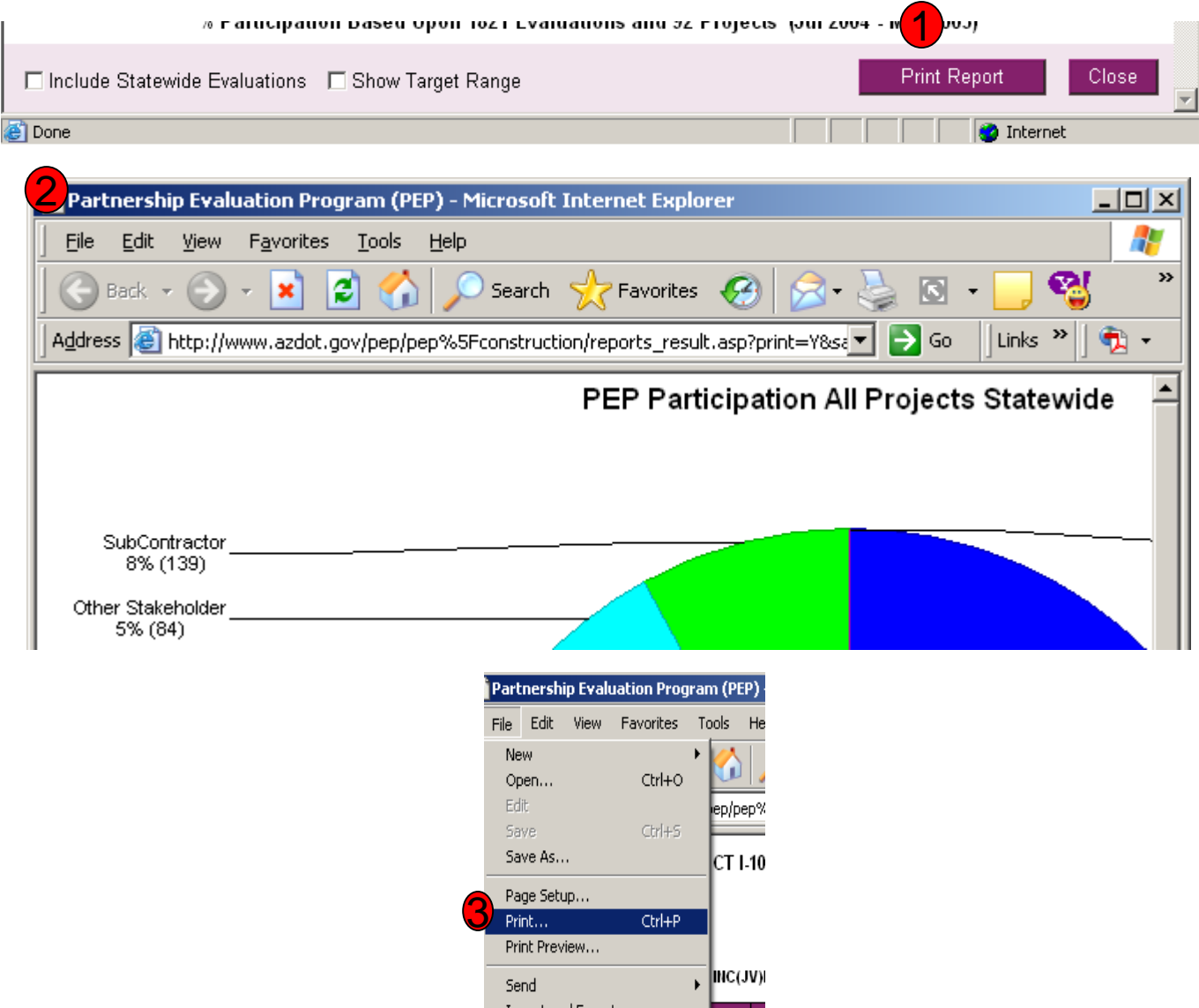
Logging Out Of PEP

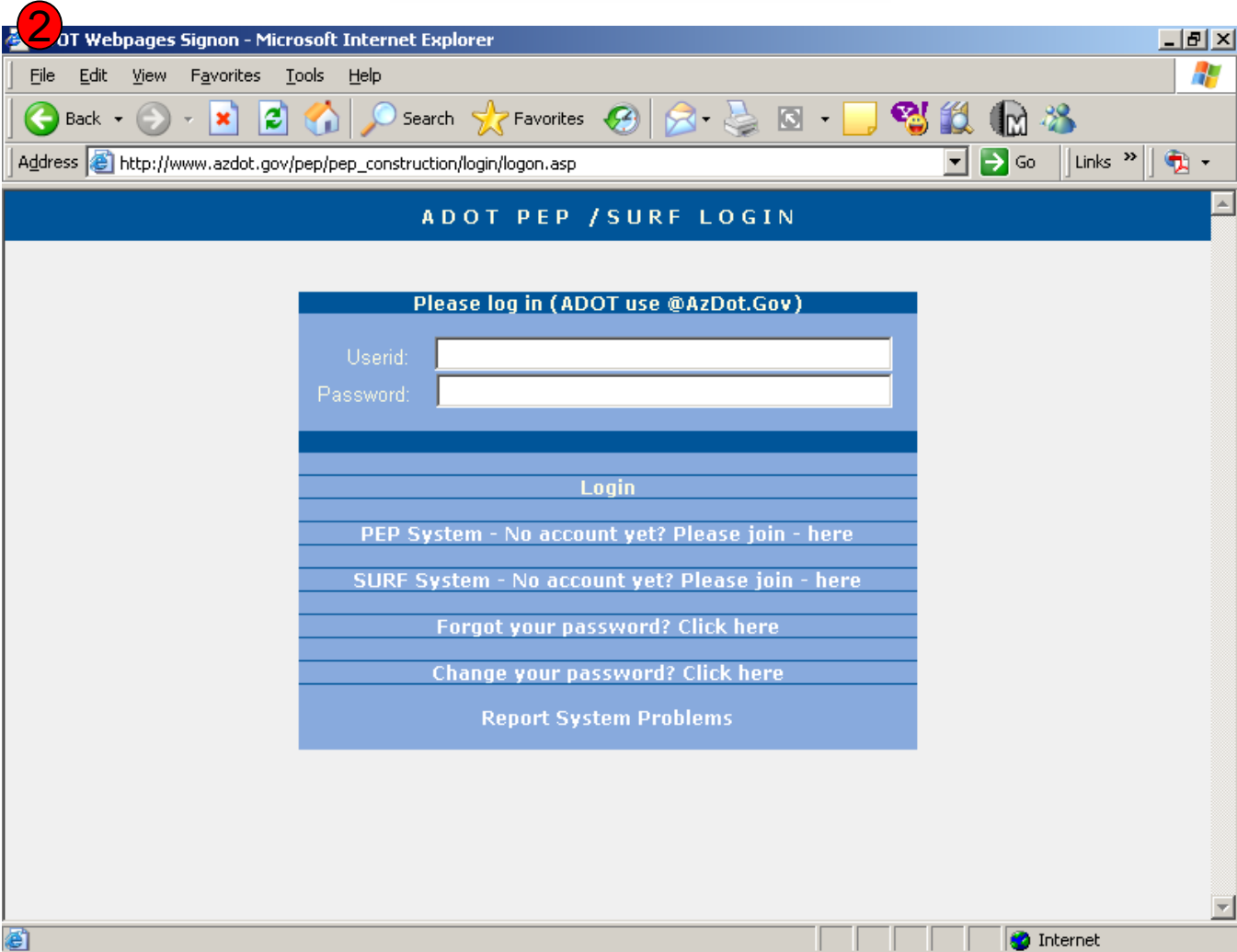1) Select 'Logout of PEP' from the PEP Main Menu.

2) The user will be logged out of PEP, and the PEP/Surf Login Screen will be displayed.

Customer Support

<u>For System Access & Issues</u> – Contact the ADOT Support Desk (602)712-7249

<u>For Training Assistance</u> – Contact the ADOT Partnering Office
Gary Sharp (602)712-7167
Judonne Greham (602)712-4875